



IT Steering Committee (ITSC)

Version: 2.6

Chesterfield County Technology Investment Model

Revision History

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Purpose

The IT Steering Committee (ITSC) has two goals with regards to technology investment decisions and the governance of the Technology Improvement Plan (TIP):

1. Maximize the return on investment for the county by making technology investment decisions that align to the strategic goals of the customers and the county.
2. Make the technology investment decisions consistently.

The purpose of the technology investment model is to support those two goals by providing structure, common language and analysis criteria. This document is not meant to be a process definition or a policy. Process definition and other supporting materials can be found on the Information Systems Technology (IST) department intranet home page.

Another important purpose for this document is to serve as a communications tool for the ITSC, customers and staff members. Expectations can be set consistently and met consistently when there is one source for the guidelines that govern the technology investment decisions.

This document is reviewed and updated no less than annually. Any changes require a majority of support from the ITSC, as defined in the ITSC Charter. The current version of this document is available on the internet at www.chesterfield.gov and on the IST department intranet homepage.

Project Classification/Criteria

The project classification approach focuses on gauging project complexity and impact to ensure the appropriate levels of review and stakeholder involvement are undertaken.

In July, 2007, a redefined Technology Investment Project (TIP) process was proposed for the ITSC. Under the new criteria, a project charter must be submitted, approved and funded through the annual TIP process if it meets one or more of the following criteria:

Revised TIP Criteria
<ul style="list-style-type: none">• The project's development schedule, consisting of the analysis, design, programming, testing and integration components, is estimated to exceed 6 calendar months.
<ul style="list-style-type: none">• The total project cost is estimated to exceed \$25,000 (not including man-hours) for initial acquisition and one year of maintenance or hosting fees.
<ul style="list-style-type: none">• The proposed solution will consist of installation of or expansion of data, voice, video networks facilities or services other than those routinely acquired through Information Systems Technology (IST) administered contracts.
<ul style="list-style-type: none">• The project will consist of the development, acquisition or installation of technologies not currently supported by Information Systems Technology (IST). The proposed solution will be enterprise in nature or consist of the development and/or purchase of a system that involves more than one department.
<ul style="list-style-type: none">• Projects that may not rise to these criteria but are mission critical to a particular department may still be submitted as a TIP request.

Information Systems Technology (IST) organizes and executes many types of technology projects. Maintenance projects, governance efforts, policy work, design sessions, pilot projects and other efforts are not included in the TIP portfolio.

The Technology Improvement Program (TIP) is a project within the larger Capital Improvement Program (CIP) for the county. The annual funding for the TIP can fluctuate from year to year. Technology projects that represent a significant investment in resources should be considered for inclusion in the CIP. Any project representing a capital investment of over \$500,000 should be reviewed with IST and the Budget Department for consideration as a CIP project or a TIP project.

Chesterfield County TIP Guidelines

Information Systems Technology (IST) coordinates all departments' information technology improvement projects (TIP) through a managed process. At any given time there are over 100 projects of various size and complexity levels being evaluated, planned, or worked on throughout Chesterfield County. Different projects are at different stages of their lifecycle and require different levels of involvement from the various Information Systems Technology (IST) and functional project team members.

Among the many benefits of coordinated project management are the increased abilities of business stakeholders, development managers, project managers and infrastructure managers to monitor project progress, manage resources, and track what work is being done.

The TIP process is conducted in two ways:

1. **Fiscal Year** – Each July, the Information Technology Steering Committee (ITSC) begins the annual TIP planning cycle. Departments submit new requests via the portfolio management system (Innotas). Departments also update existing requests in Innotas with information that may have changed during the year. These requests are reviewed, scored, and a recommendation for the upcoming fiscal year is made by the Information Systems Technology (IST) department to the ITSC. The ITSC meets at the end of October to review the recommendation and make decisions on the portfolio, before it is submitted to the board of supervisors with the capital improvement program (CIP).
2. **Mid Year** – Business needs may emerge very quickly. During the course of the fiscal year if a department needs an investment in technology to address a business problem or opportunity, they can enter a TIP request. The department should schedule time with the ITSC in a monthly meeting to review the request, and determine how best to proceed. TIP requests entered during this cycle are scored and reviewed the same as other TIP requests. See the "TIP Reserve Funding Requests" section for more information.

Before the TIP request is entered, a number of work activities need to be completed. The department business need should be reviewed with IST, initial project scope should be evaluated, the return on the investment should be estimated and the other sections of the TIP request form in Innotas completed.

The TIP process concludes for a project when the business owner signs off on the project closeout document and the ITSC votes to close the project.

TIP Portfolio

The TIP portfolio is a collection of technology projects in varying states of approval and funding:

1. **Appropriated** – The Board of Supervisors has approved funding for the project, the financial account has been created, and work may begin on the project. The accounts are setup and funds provided for project work.
2. **New** – The project has been submitted for the first time. No funding is currently available for the project. Earliest date that funding may be available is July 1st of the following fiscal year.
3. **Projected** – The project has been planned for a future fiscal year. Because the Board of Supervisors can only appropriate funds in the first year of the three year plan, these projects officially have no funding. The TIP Process includes the reevaluation of the non-appropriated portfolio each year. A status of “projected” for a project is NOT a guarantee of funding.
4. **Proposed** – The project is in the portfolio management system, has been through at least one cycle of reviews, and has not been projected for a specific fiscal year.

New, Projected and Proposed projects compete each year within the investment model for the funding that is allocated to the TIP portfolio each year.

Projected and Proposed projects should be updated by the submitter on an annual basis as specified in the TIP schedule (see TIP Schedule section.)

TIP Scoping & Evaluation

Among the most important considerations of a TIP is the scope of the need from an *enterprise* perspective. Often the business needs of one department are common to other departments. Technology investments which serve to address a business need across departments and divisions will provide a greater return on investment for the county. IST can assist the requesting department in assessing whether the business need is shared across the enterprise.

During the formation of the TIP an initial assessment will be made regarding the source of the solution. The business model of IST provides a number of options for the source of the solution, and each will impact the cost of the TIP significantly. The solution sources are:

1. **Commercial Off The Shelf** - Systems that are purchased from a vendor with few, if any, changes.
2. **IST Development** – Systems developed in house, using IST staff.
3. **Contractor Development** – Systems developed in house, using external temporary resources.
4. **Cloud / Hosted** – Systems that do not reside on the county network, or on servers that the county manages. The system is presented and accessed most frequently via a web browser and the vendor provides all of the system maintenance.
5. **Partner Provided** – Systems that are developed by business partners and provided to us at no cost or at a small cost. Typically support and maintenance of these systems is the responsibility of the county.

Cost Estimation

Departments, working with IST, will produce an initial cost estimate for the TIP. This estimate should include the following costs, depending on the projected type of solution:

1. **Infrastructure** – Servers, networking equipment, etc.
2. **Software Licenses** – Initial purchase and first year of maintenance
3. **Contractors** - Skilled technology positions, business analysts and project managers
4. **Maintenance** - First year of software / system maintenance only

5. **Hosting / Access** – Fees for “cloud services” or hosting fees for first year only
6. **Contingency** – 10% of the total estimated project cost, added to request
7. **Training** – Specialized skills necessary for project, for staff only (not contractors)
8. **Startup / On Boarding Fees** – If needed, fees to support first year of use and users

Cost estimates for the TIP shall NOT include the following. If these expenses are required for the success of the project, the department must demonstrate the source of funding.

1. **Administrative & Clerical Support** – General office support.
2. **2nd year Maintenance** - See below.
3. **Staff** – No staff should be hired with TIP funding, nor should a TIP account be used to pay for an existing employee.
4. **Awards & Recognition** – Cash awards, celebrations and other awards for TIP projects should be planned for in the department budget.

Of particular interest to the ITSC in recent years has been the planning for system costs in the out years. The TIP should include funding to provide for the first year of recurring fees (software maintenance, hosting fees, cloud system access, etc). Departments should be prepared to demonstrate their strategy for providing these expenses in the second and subsequent years of operation. Departments should also present Budget Department agreement on the provision of on-going funding.

Return on Investment Guidelines

Departments need to consider the following rule of thumb with regards to ROI calculations: All ROI needs to be measurable, objective and reportable.

The return on investment (ROI) for a TIP is calculated in two ways, both measurable:

1. **Tangible Costs** – When the TIP project results in cost savings or cost avoidance, the costs can be compared to the projected capital investment to establish the payback period, and the return on the investment for the one and five year periods.
2. **Process Improvements** – As technology is implemented, business processes should become more efficient. Measuring efficiencies gained in terms of time savings, improved accuracy or other qualities is an important part of communicating the ROI of a TIP.

The ROI is documented during project submission, in the Innotas online form.

ROI is a critical component of the scoring of the TIP and the consideration of the ITSC. A critical factor in the recommendation of a project for the TIP portfolio is the ability of the project to pay for itself over a period of time and to continue to create value for the organization.

The ROI of completed projects will be reviewed on an annual basis by the ITSC, based on a report compiled by IST. The report shall be delivered before the annual meeting to set the next year's portfolio.

TIP Project Management & Governance

TIP projects should be managed according to the Project Management Institute (PMI.org) best practices. IST management assigns project management resources to the active TIP projects depending on the size, scope and cost of the TIP request. IST may compel the requesting

department to include contract expense for a project manager into the costing information for the project. IST may also assign project coordinators and business analysts as needed.

The ITSC will periodically review the status of the projects in the TIP portfolio and request information as necessary. IST personnel will present to the ITSC any significant deviations in the TIP projects with regards to scope, cost or effort.

Additionally, coordinated project management provides management with a single, comprehensive list of projects requested and underway. Visibility is provided through IST's cloud based portfolio project management system, Innotas. This allows managers to easily and quickly inform customer departments and the ITSC where Information Systems Technology (IST) project resources are currently being allocated, and when resources may be available for their project requests. It also illustrates where specific projects fall in the 'big picture' of enterprise projects and provides visibility into a project's overall status so that management may make informed, data driven decisions on projects investments.

To provide governance and oversight for portfolio management IST has formed a Project Management Office (PMO). The PMO, in cooperation with the customer departments, is responsible for setting standards for technology project management.

On a regular basis, IST staff will bring to the attention of the ITSC projects which have not started, had no activity or appear to have been dormant for a period of time. The ITSC can then resolve to take action on these projects. Making sure that the technology investments by the county are active and bringing value to the county is a key governance responsibility of the ITSC.

TIP Reserve Account

The reserve account serves several important purposes in the administration of the investment model. The ITSC makes recommendations on the use of the TIP reserve account. Depending on the amount recommended for action by the ITSC, the action may need approval by any or all of the following: the Budget Department, County Administrator and Board of Supervisors.

1. **Contingency Fund** – In the event a project is over budget, out of scope or for other reasons will not finish due to funding, the ITSC may at its discretion propose to the Budget Department and possibly the County Administrator a transfer of funds from the reserve account to the TIP project account.
2. **Mid Year TIP Requests** – As project requests are presented outside the yearly cycle, the reserve account is the sole funding mechanism the ITSC has at its disposal.
3. **Project Close Out** – When a TIP project closeout is approved by the project manager, the business owner and the ITSC, the remaining funds are transferred from the TIP project account to the TIP reserve account.

There are several important aspects of the handling of the TIP reserve account.

When a balance remains in the TIP account for a completed project, the only disposition for the balance is to be moved to the reserve account. The business owner does not have the ability to redirect the balance to another project, another TIP or any other account.

Because the primary purpose of the TIP reserve is the contingency fund for the entire TIP portfolio, its use for funding new projects at midyear is very carefully considered.

Depending on the level of funds in the reserve account, some portion of it may be used during the annual planning cycle to augment the capital allocation for the year. The ITSC will review recommendations and approve the allocation of funds from the TIP reserve.

The recommended level of the TIP reserve as a funding contingency is difficult to determine via a formula. As of the FY2013 annual TIP cycle, all new projects will have a 10% cost contingency built into the funding request. For projects that require newer or more complex technologies, a 15% cost contingency will be required. IST will make a recommendation to the ITSC on an annual basis as to the optimal level of the reserve account. This recommendation will be provided before the annual meeting to set the next fiscal year's portfolio. The recommendation will be based on:

1. Projects appropriated before FY2013, without the 10% contingency
2. Projects projected to be active during the current fiscal year
3. Projects with inherently more volatile cost structures (contractor development, RFP)
4. Significant changes in key vendors or other economic factors

The TIP process concludes for a project when the business owner signs off on the project closeout document and the ITSC votes to close the project. Any funds remaining in the TIP account are then swept into the TIP Reserve account.

During the monthly ITSC meetings IST shall report on the TIP reserve account balance, and any proposed changes to the account.

TIP Reserve Funding Requests

Requests for funding outside the annual TIP process may be received by the ITSC for a limited number of reasons. The TIP Reserve capital account is the only source of funding available to the ITSC.

Consideration of the funding requests requires the business owner, the project manager (if assigned) and the IST representative participate directly with the ITSC in either a special meeting or a regularly scheduled monthly meeting. An ITSC membership quorum is required to take any official position of a funding request, as defined in the ITSC Charter. The disposition of the request will be recorded in the minutes for the meeting, and circulated for review.

In addition to the TIP request, the business owner will submit responses for the applicable evaluation criteria for review by the ITSC. The document will be made available to the ITSC no less than one week before the scheduled meeting.

Evaluation criteria for each of the types of funding requests are as follows. Concerns or failure to address any of the evaluation criteria may result in denying or deferring the funding request.

Mid-Year TIP Requests (New)

Department and enterprise needs may materialize quickly. Opportunities may arise that present value, if acted on quickly. In the event funding is needed for a new or previously submitted project outside the annual TIP cycle, the project request may be reviewed by the ITSC, and the funds allocated (with appropriate approvals) from the TIP reserve. Reference section "TIP Reserve Account" and "Chesterfield County TIP Process".

Evaluation Criteria:

1. The request will be scored as any other TIP request, and compared to the existing backlog of projects. If the request was previously scored, all the scores and criteria for the project will be reviewed and changes examined.
2. The business reasons for considering the request outside the normal TIP annual process must be clear, compelling and represent significant value to the organization beyond what would be obtained by adherence to the annual TIP cycle.
3. The request will be reviewed against the existing portfolio of projected and proposed TIP projects to determine if the submission already exists for another department or the enterprise.

Additional Project Funding (Appropriated)

Projects that are appropriated may have valid reasons to request more funding. These requests need to be considered carefully. The business owner and the project manager will participate directly with the ITSC to review the evaluation criteria.

Evaluation Criteria:

1. The business reasons for the funding request must be clear, compelling and represent significant value to the organization.
2. Alternate funding sources will be examined. Do funds exist in the department budget or other sources such as grant funds?

3. The scope of the project will be compared to the submitted scope from the Innotas submission system. The business owner will account for any changes in scope, when the changes occurred and the approval for the changes. If the changes are significant, the ITSC may request the project be scored and compared to the portfolio of projected and proposed projects.
4. Each TIP project is recommended to have between 10% and 15% contingency funding included in the original funding request. The business owner should demonstrate how the original contingency funding was calculated and why it is not sufficient.
5. The impact of project failure should be reviewed. The business owner needs to highlight the costs of cancelling the project. This cost does not include the expenses to date, lost staff productivity or the failing to achieve the ROI of the project.
6. If the project received funding over 18 months before the request for additional funding is made, the business owner should highlight the reason for the delay in the project and the analysis that led to the funding request.

ITSC Actions

Funding request will be compared to the actual TIP reserve balance to determine if funding is available for the stated project scope.

After the evaluation criteria are reviewed, the ITSC may vote to take one of three actions on the request:

1. **Approval** – The request is approved, resulting in a recommendation to the budget department from the CIO or Chair of the ITSC for funds to be transferred to an existing capital TIP project account or a new project account be created with funding.
2. **Denial** - If the request is denied, the CIO or Chair of the ITSC will draft a concise communication to the requestor stating the position of the ITSC.
3. **Deferral** – The ITSC may defer the request pending further research or analysis, for consideration in another meeting or for inclusion in the annual TIP process.

Regardless of the outcome of the request, it is the responsibility of the CIO or Chair of the ITSC to communicate fully the disposition of the request to all parties, the budget department and the Deputy County Administrator / Chief for the applicable area.

Project Scope Change

The scope of the appropriated project may change between the time the project is recommended for funding and the beginning of the fiscal year. This may be due to changes in statutory regulations, vendor product lines, organizational changes or other reasons beyond the control of the requestor. The changes in scope can be brought to the attention of the ITSC by staff members, project managers, business sponsors, the CIO or any other participant on the project.

Changes in project scope should be documented and presented by the business owner and the project manager (if assigned). The original scope of the project is considered to be the submission in the Innotas system. The changes should be documented and provided to the ITSC members no less than one week before the scheduled review meeting.

The scope of the project will be compared to the submitted scope from the Innotas submission system. The business owner will account for any changes in scope, when the changes occurred and the approval for the changes. If the changes are significant, the ITSC may request the project be scored and compared to the portfolio of projected and proposed projects.

The ITSC will determine whether the proposed change in scope meets the intent of the original project request, returns the same value and can be accomplished within the same fiscal constraints.

After a review of the proposed changes, the CIO or chair of the ITSC will draft a recommendation on the disposition of the project. The recommendation will be communicated to the business owner, department head, Deputy County Administrator / Chief and Budget Director.

TIP Request Prioritization

To guide the allocation of resources, a prioritization process is utilized for all information technology project requests. Understanding the TIP prioritization factors will assist the project submitters in understanding the rationale for determining how and why resources are assigned to specific projects. By definition, higher priority projects will receive higher levels of resources (time, staff, and finances).

A certain amount of flexibility will always be a component of the project prioritization process. Management must be able to adjust the process when necessary to achieve critical outcomes. However, routine use of basic guidelines will help members understand the evaluation process by which projects are prioritized.

Factors that are considered when prioritizing projects include:	Weight	Score (0-10)	Total (score * weight)
1. Statutory Compliance	10%	10	1
2. Citizen Service Improvements	20%	5	1
3. Positive Financial Impact: Cost Savings/Revenue Generation	25%	5	1.25
4. County Strategic Goals Improvement	10%	9	.9
5. Health/Welfare/Safety Issue Remediation	10%	5	.5
6. Internal Service Improvements	10%	5	.5
7. Enterprise Scope	15%	5	.75
Total	100		5.90

In addition to the above objective measures, the ITSC may during its annual review introduce subjective measures into the decision over which projects receive funding or remain in the TIP portfolio. IST will provide "alignment factors" for the ITSC to consider which may include:

- **If any division or department exceeds 60% of the approved projects, additional approval by the ITSC will be required.**
- **Determine max % of spend per technology edge (trailing, leading, bleeding). The county should not want to invest in trailing technologies.**
- **Projects not started in the fiscal year in which approved, or involving scope changes are subject to review.**

ITSC may vote to move the funds to the TIP reserve and put a halt to any project. This will be part of the yearly meetings IST management has with the departments. The affected department will be notified and they will then have the option to resubmit the TIP for a later year. The goal is to reduce the project backlog and ensure TIP resources are invested rather than sitting idle.

And finally, the ITSC may “force rank” alignments given the dynamic environment in which the County operates. A project’s priority can change over the lifetime of the project. The ITSC will be advised of any major changes in project status that affect the portfolio.

Annual TIP Schedule

Task	Timeline
1. Customer department reviews business needs with IST and collaborates on TIP submission.	All Year.
2. IST Prepares Innotas environments, provides education for customer departments, pairs business analysts with departments to facilitate the submission process.	July
3. Customer initiates new TIP submissions via Innotas.	August
4. Customer updates all non-appropriated TIP projects in Innotas to include scope, cost, ROI, enterprise scope.	August
5. IST reviews TIPs with departments and the ITSC, collaborates on score based on TIP Investment Model.	September
6. IST produces documentation, double checks entries, produces initial recommendation.	October
7. IST provides documentation packet to ITSC members for review	Mid October
8. ITSC Annual Review	Early November
9. IST submits TIP requests to Budget & Mgt.	Late November
10. TIP Presentation for County Administrator’s Meeting.	December
11. Board of Supervisors Approves Capital Improvement Plan	April
12. Baseline Projects (revisit with requesting departments to solidify requirements and set project baseline (prepare charter, project plan as necessary)	May
13. As part of the County budget process, approved capital project accounts are budgeted for the upcoming fiscal year and accounts created in IFAS following budget approval.	July

Appendix A: Scoring Guidelines / Common Taxonomy

When applying the investment model to TIP submissions, all parties should strive to utilize a common taxonomy or principles of classification. When an IT representative meets with a business unit to discuss their TIP submission, IT may use the following as general guiding principles:

1. The first factor, Statutory Compliance, is meant to provide priority to projects that are mandated by state, local or federal statute. This does not cover process improvements for functions that are mandated by law or replacement of systems which have a viable alternative. Credit for process improvements is afforded in other sections of the scoring model. A 10 in this area would be appropriate if the tip is mandated by a new law, and it must take place in the current year of the submission. (10 being the highest). If it is mandated to take place in year 3, it might score a five. If it is not mandated at all, it might score a 0. A system which supports compliance that has reached end of life or must be replaced will be considered the same as a new law and afforded a maximum score of 10.
2. For the second factor, Citizen Service Improvement, a total score is accumulated from three areas as follows:
 - 2.1. If the TIP provides our citizens a new service or way to transact business with the county up to three points can be awarded. If the service indirectly benefits citizens, only one point may be awarded.

- 2.2. If the service currently exists and the TIP represents significant improvements, it may be awarded up to 3 points.
- 2.3. The benefit of the proposed service, whether the result of a new or improved implementation, may justify up to 4 additional points. A new service that provides significant improvement or new functionality will be eligible for a total of 6 points from the first two categories, and then possibly 4 for the benefit.
3. For the third factor, Positive Financial Impact, a new revenue source that also provides our citizens a convenience, such as the new DMV Select service offering, might score a 10. A change to an existing business process which results in a cost savings might score an 8. ROI and time required to recover the investment is an important aspect of this area. If a payback of less than 12 months is planned, it may score a 10. A payback time of 2 years would score a 5, and no anticipated payback period may score a 0. Cost avoidance (if quantifiable) shall be considered the same as a new revenue source, for purposes of this scoring and calculation of ROI.
4. For the fourth factor, County Strategic Goal improvement, the ideal score would be for a TIP submission that moves a department in a new direction as a direct result of meeting more than one strategic goal. For example, implementation of a 311 system might score a 10 if it can be demonstrated that it would help a department "To provide world-class customer service" and for Chesterfield to be "known for extraordinary quality of life". If the TIP can be demonstrated to meet one strategic goal, it would score a 5. If the TIP is aimed at meeting a new statute, but is not driven by any county goal, it would score a 0.
5. Health/Welfare/Safety Issue Remediation. If a TIP provides a new health welfare or safety service to employees or citizens, it might score a 10. If the TIP provides a service that indirectly improves service in this area, it may score a 5. If the TIP is not related to any of these areas, such as a new financials system, it may score a 0.
6. Internal Service Improvements: A TIP that applies new technologies to existing processes often yields dramatic, quantifiable internal improvements. Improvements such as standing up a new help desk, automating forms, or implementing a new system, *especially when it streamlines operations between business units*, in this example it might score a 10. An improvement in process in just one business unit might score a 7. A process improvement within a workgroup may only score a 5. If the TIP is by nature externally focused but improves on a process, it may score a 3.
7. Enterprise Scope: An enterprise systems is one which fills a business need as a standard solution in the County and one for which no other solution will be offered. For example, the financials ERP IFAS is a true enterprise system. It is used by all departments, and there is no alternative. Laserfiche for document scanning and retention is another example. The scope of the enterprise system is measured by how many departments, customers and employees use the system. In all cases, the enterprise system represents the only solution offered. If the scope of the enterprise system is fewer than 5 departments, up to 4 points may be awarded. If more than 10 departments are in scope, up to 10 points may be awarded. For a department to be in scope, the business need must exist, even if there is no funding to support the implementation. If the system is not enterprise in nature, no points are awarded.